CHIEF FINANCE OFFICER

Application Pack

64 Prince of Wales Drive, Ipswich IP2 8PY
Telephone: (01473) 684922

Contents

1. Welcome from the CEO and Chair
2. Vision, Values and Ethos
3. Governance Structure
4. Our Shared Services Team
5. CFO Role Profile and Person Specification
6. How to Apply

64 Prince of Wales Drive, Ipswich IP2 8PY
Telephone: (01473) 684922

Dear applicant

Thank you for your interest in our Multi Academy Trust. We hope that the enclosed pack will give you all the information you need to help you decide if you might be the person we are looking for.

Our current CFO has successfully led the fiance function of the Trust since January 2018 and will be moving on to a more senior position in May 2023. Trustees are seeking to appoint an exceptional individual to lead the financial and operational aspects of the Trust in the next stage of its development.

Like any MAT, we want the best for our children and strive to ensure that each of our schools gives every child in its care the quality of education they deserve. At OMAT we seek to do this by striking a careful balance between each school's individuality on the one hand and a certain family likeness across the trust on the other. We believe that this combination of independence and belonging allows each school to relate to its own unique community whilst sharing a real ownership for the thriving of the whole trust.

An important part of our ethos is that we are a local trust. Whilst we hope to expand over the coming years, we very much cherish the sense that we are a relatively small organisation serving our local area.

If you share something of this vision and believe that you could further it as we enter the next chapter of our life together, we very much hope that you apply to be our CFO.

We look forward to receiving your application.

Regards

Father Paul Carter, Chair of the Trust Anna Hennell James, CEO.

64 Prince of Wales Drive, Ipswich IP2 8PY
Telephone: (01473) 684922

Vision, Values and Ethos

At Orwell MAT, children are at the heart of everything we do, and we ensure that every decision we make is serving the children of the Trust equally. Our mission is to create schools where learning is unstoppable and aspirations have no limit, enabling all children to flourish, no matter what their starting point or needs. Everyone in Orwell MAT takes collective responsibility for success across the Trust and we work together to bring about the best outcomes across all of our schools. We ensure that there is equality of experience and opportunity for all children, no matter which school they attend.

We believe that we amount to more than the sum of our parts; membership of our Trust leads to better experiences and outcomes for the pupils, staff, and the communities our schools serve. We have a clear set of values, which underpin our vision and mission.

Vision:

Every child has an exceptional educational experience.

Mission:

To create excellent school communities where learning is unstoppable and aspirations have no limit, enabling all children to flourish, no matter what their starting point or needs.

Values

Community: We will foster a sense of community throughout the Trust, within our schools, our local communities and within the wider education community.

Integrity: We work in a culture of trust, honesty and transparency with each other, ensuring every decision serves the children of the Trust equally.

Opportunity: We will hold inclusion at the heart of everything we do, ensuring everyone is equally valued, and given equal opportunity to thrive. We will be outward facing to learn from the best in order to be the best.

#TeamOrwell: Everyone benefits through shared best practice, ensuring consistency whilst maintaining individual identify. Decisions are made by those who carry responsibility and accountability. Genuine collaboration and a culture of one Trust will ensure #TeamOrwell succeeds: both children and colleagues.

Within our schools we have good and outstanding practice which is resulting in excellent outcomes. We have a cohesive leadership team who trust one another enough to have productive, honest debate and challenge, and hold one another to account. We have the capacity and commitment to work with other schools to support them in their journey to excellence. We understand the need for challenge and support, with a rigorous, tenacious approach in the pursuit of excellence. We believe that by working with other schools we can have a positive impact on standards in education across Suffolk and beyond.

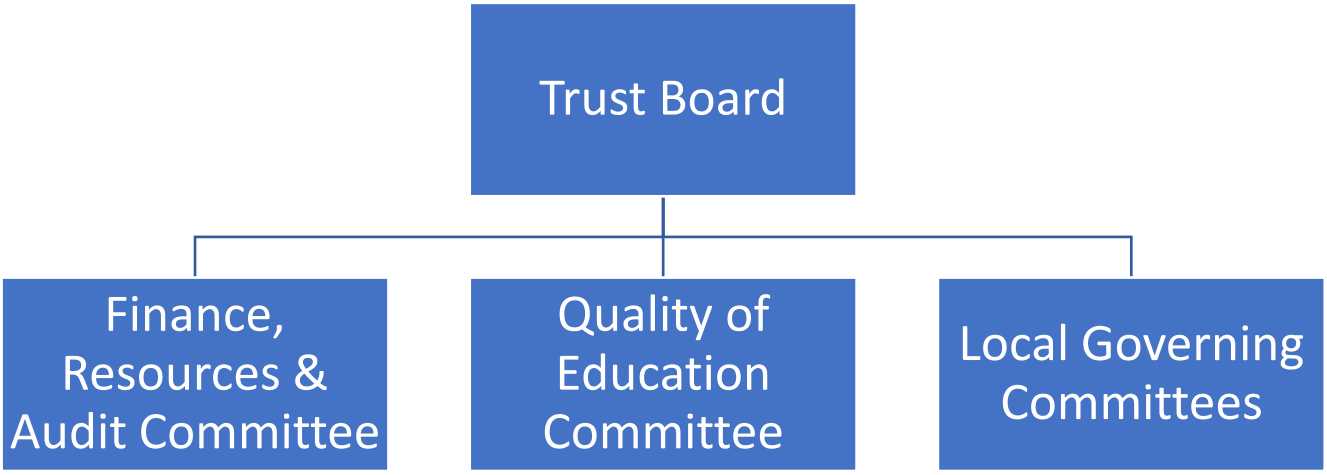
64 Prince of Wales Drive, Ipswich IP2 8PY
Telephone: (01473) 684922

Governance Structure

The Trust Board has two sub committees and currently seven Local Governing Committees. The Chair of the Board and CEO meet regularly with Local Governing Committees to maintain good communication across the Trust.

The Trust has a nominated Safeguarding Trustee who works with local safeguarding governors and DSLs to support a strong culture of safeguarding across the Trust.

The CFO plays a significant role in advising the FRA committee, and attends all FRA and Board meetings.



64 Prince of Wales Drive, Ipswich IP2 8PY
Telephone: (01473) 684922

Shared Services Team

The CFO leads the Shared Services Team (SST), which provides financial and operational support to all of our schools, and well as fulfilling the central finance function. The SST is based in the bungalow on the site of Halifax Primary School. It is a small team of 6, including the CEO, CFO, 3 finance team members and a business support officer.

The Finance team and CFO support the schools with all areas of financial management, payroll and HR administration. The Shared Services Team also provides more generalised support on the other areas delegated to school leadership as needed or as directed by the Trust Board such as health and safety, GDPR, premises, HR, IT, catering etc as well as the CEO supporting with the most important area of our work in improving outcomes for children.

Being such a small team means everyone works closely together and there is a very supportive and open culture which helps SST to achieve all that they do.

https://www.omat.org.uk/

64 Prince of Wales Drive, Ipswich IP2 8PY
Telephone: (01473) 684922

Chief Finance Officer Job description

Role Purpose:

To provide the strategic leadership and management of all financial and business aspects of the Trust, ensuring that every child in an OMAT school has an inspirational learning journey and is well prepared for the next stage in their academic career, with a passion for lifelong learning.

The CFO will provide strategic and operational leadership in all aspects of business activities within the Trust's schools and be accountable for the operation, maintenance and development of systems, processes and procedures relating to budget, finance, payroll, pensions, premises, HR, and health and safety.

This is an Executive Leadership Team post which will change over time and the post holder needs to be flexible, responsive and proactive in the context of strategic priorities.

Accountabilities:

Strategic

Provide strategic leadership and management of the Trust's finances, advising the Trustees, CEO and Headteachers and the relevant committees on all financial matters pertaining to the Trust.

Contribute to MAT strategy and policy development to support the Trust's mission and vision, ensuring that every child in an OMAT school has an inspirational learning journey and is well prepared for the next stage of their academic career, with a passion for lifelong learning .

Advise the Trust on financial strategy which supports and develops the educational aims, ethos and growth strategy of the multi academy trust.

Develop and implement the financial strategy for the Trust to support delivery of strategic objectives sustainably and in the Trust's best interests.

Ensure compliance with all statutory regulations and guidance from DfE, ESFA , HMRC, business and charitable law etc and monitor changes in relevant legislation and the regulatory environment, taking appropriate action when necessary.

Ensure that financial systems and processes are developed and implemented to deliver effective and efficient financial support.

Design and deliver financial strategies that support the best possible educational provision in every one of the Trust's schools.

Ensure all material business decisions recognise immediate and longer term implications, fully considering opportunities and risks against the Trust's overall financial strategy and vision.

Support the Executive Leadership Team (ELT), Trust Board, and committees providing advice and financial modelling eg pay structures, reserves, premises.

Contribute to the development of all plans, priorities, proposals and policies for the Trust, ensuring that they are financially sustainable.

Develop and deliver a procurement strategy across the Trust, ensuring compliance with tendering regulations and best value.

Develop and implement strategies that maximise the value of premises , equipment and services.

Operational

Lead the promotion and delivery, by the whole Trust, of good financial management so that public money is safeguarded at all times and used appropriately, economically, efficiently and effectively.

- Lead and direct a finance team that is resourced to be fit for purpose, delivering
- Statutory reporting and returns including ESFA, HMRC and Companies House.
- Financial planning, reporting and management
- An accurate and reliable payroll service
- Financial systems and services including cash management and banking
- Securing value for money
- Benchmarking financial performance against KPIs and other schools and MATs
- Risk Identification and mitigation
- Positive working relations with internal and external parties.

Lead the annual budgeting process, co-ordinating outcomes and presenting to the Trust Board.

Take lead responsibility for monitoring the Trust's annual budget, reporting to ELT and the Board.

Liaise with external auditors and take responsibility for any identified actions.

Liaise with internal auditors and take responsibility for any identified actions.

Preparing and maintaining the Trust Risk Register.

Ensure that financial monitoring is in place for external funding and traded services.

Source external advice where required at best value.

Implement and integrate finance systems ensuring that schools have a consistent approach.

Oversee all procurement and contract management, taking a lead and managing all Trust wide contracts.

Oversee HR administration.

Prepare Trust wide bids and liaise with any external providers submitting bids on the Trust's behalf of including CIF bids.

Maintain oversight of the WorkNest Health and Safety system, and provide regular update to the Board.

Managing Relationships

Communicate effectively with stakeholders and the community on Trust business.

Manage relationships with third party service providers and suppliers.

Develop relationships with agencies that provide sources of funding.

Develop relationships with potential and existing customers and suppliers of the Trust and seek opportunities to develop traded services with them.

Build and maintain effective relationships with partners, the public and the media.

Communicate with other MATS, Teaching Hubs, the Local Authority and other educational service providers to share good practice and identify opportunities to achieve better value or generate income.

Leadership and Development

ELT member, supporting colleagues and working collaboratively to develop the Trust.

Maintain effective working relationships and team ethos with all members of the Trust.

Manage a team of professional staff including selection and recruitment, induction, performance management, training and development, absence management etc.

Contribute to the development of the Trust strategy, working collaboratively with a range of stakeholders and supporting the CEO.

Develop and maintain effective professional networks.

Visibly demonstrate the Nolan principles in action.

Ensure teams continue to develop and demonstrate the Trust ethos.

Developing the Trust

64 Prince of Wales Drive, Ipswich IP2 8PY
Telephone: (01473) 684922

Ensure that the Trust develops and maintains a positive reputation, taking clear accountability as a spokesperson for the Trust locally and nationally, when required.

Take a proactive role in any DfE applications for Free Schools.

Lead the Due Diligence process in respect of schools or academies potentially joining the MAT.

Support integration of schools joining the Trust through provision of systems, standards and processes.

Identify strategic opportunities to develop the Trust that are in support of the values and aims and contribute to financial sustainability.

Research and provide advice on funding, grant and other income generating opportunities for the Trust.

Prepare business case assessments and advise on the suitability and viability of projects and initiatives.

Develop strong, positive relationships with colleagues that contribute to collaborative work across academies and support other staff in participating in Trust work both within and outside the Trust.

The duties above are neither exclusive nor exhaustive and the post holder may be required by the CEO to carry out appropriate duties within the context of the role, skills and grade.

CFO Person Specification

The person appointed will be expected to have a record of successful financial management. They will need significant management experience, and a track record of delivering strategic goals. The appointee will be considered the strategic lead for Finance and Operations across the Trust including risk and compliance. The successful candidate will be proficient and have a depth of up-to-date knowledge in all matters related to these areas.

Criteria	Essential or Desirable	Method of Assessment Application Form (AF) Selection Process (SP) Interview (I)
Education, Qualifications, Training and Experience		
Recent relevant strategic experience	E	AF, I

64 Prince of Wales Drive, Ipswich IP2 8PY
Telephone: (01473) 684922

Recent relevant strategic experience gained at a senior level in a school or Trust	D	AF
GCSE English and Maths, grade A*-C	E	AF
Qualified accountant (eg ACCA, CIPFA or CIMA)	D	AF
Demonstrable evidence of a commitment to continued professional development and up to date accounting principles	E	AF, I
Skills/Professional Qualities		
Excellent leadership skills	E	AF, SP, I
Excellent communication skills, both written and oral	E	AF, SP, I
Excellent interpersonal skills and negotiating skills	E	SP, I
Financially competent with higher level numeracy skills	E	AF, SP
Excellent organisational skills	E	AF, SP
Excellent presentation skills to all levels within and outside the organisation and an ability to talk with authority and command respect of the audience	E	I
Excellent ICT skills	E	AF, SP
Present "solutions" rather than problems to enable effective decisions to be made	E	AF, I
Management/Personal Qualities		
An excellent manager and leader	E	I
A team player respected by others	E	SP, I
Track record of working as a member of a Leadership Team	E	AF
Manage own and others workloads appropriately	E	AF, I
Track record of multi-tasking, prioritise effectively and meeting deadlines and targets	E	AF, SP
Strategic thinker	E	I
Problem solver, make good judgements and take decisions	E	I

64 Prince of Wales Drive, Ipswich IP2 8PY
Telephone: (01473) 684922

Honest and transparent in all business activities	E	I
Earn the respect and confidence of varying groups of staff and contractors, and Trustees	E	AF
Open and constructive, accepting feedback and always willing to Learn	E	AF
Diplomatic and able to operate well at all levels	E	AF
Energetic and enthusiastic	E	AF
Experience and Knowledge		
Experience of working as part of a senior management team	E	AF
Experience of initiating, leading and managing change	D	AF, I
High level of commercial awareness	D	AF, I
Successful track record of managing and operating a substantial accounting system and software packages	E	AF, I
Demonstrable experience of budget setting, budget management, procurement systems, income generation (including bids and proposals) and financial reporting	E	AF, I
Experience of cost effectiveness negotiation and monitoring and efficiency savings	E	AF, I
Demonstrable evidence of leading and supporting a finance team	E	AF, I
Experience of working with senior leaders in organisations and being recognised by them as the "go to" person for financial knowledge and expertise including all areas of risk and compliance	E	AF, I
Working knowledge of a Multi Academy Trust and an understanding of the issues	D	AF, I
Detailed knowledge of • Charities Act accounts	E	AF, SP, I

• Management accounts Limited Company Accounts • Computerised accounting packages • Internal controls and risk management • Capital Funding • Commercial Requirements • Computerised accounting packages • Internal controls and risk management • Capital Funding • Commercial Requirements		
Premises / Estates management (maintenance/capital building projects, etc)	D	AF, I
Knowledge of health and safety management, risk assessment methodology	D	AF, I
Awareness of and commitment to Equal Opportunities	E	AF, I
Meets safeguarding requirements to work with children and young people	E	AF, I

How to Apply

Application
Please complete the application form and enclose a covering letter stating why you believe you are a suitable candidate for the role and send them to Office@omat.org.uk, for the attention of Anna Hennell James, CEO.

Closing date
Your application should be received no later than **9.00am on Monday 27th March 2023.**

Pre-interview assessments
Shortlisted candidates will be asked to complete an online assessment ahead of the interviews.

Selection process & interviews
Interviews and assessments are scheduled to be held on 30th and 31st March 2023.

Other information and start date
Please note that this appointment is subject to an enhanced DBS clearance and pre-employment checks.
We are looking for someone who can start as soon as possible after May 2023.

Contact us

To discuss the role with our CEO, Anna Hennell James, or our current CFO Jenny Hunwicke, or to arrange a visit to any of our schools or the central office, please contact the shared services team, who will be happy to help you:

office@omat.org.uk 01473 684922

We look forward to receiving your application.